

# OFFICE OF FINANCIAL MANAGEMENT

## BUDGET AND ALLOTMENT SUPPORT SYSTEMS (BASS)

### *PERFORMANCE MEASURE TRACKING AND ESTIMATING SYSTEM (PMTES)* **COMPLETE SYSTEM MANUAL**

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*Version 2.0  
March 2004 Update*



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## I. Record Filter

Concept – The **Record Filter** screen is the first screen users see when starting PMTES. From this screen users can set the filters to define what information they wish to view, then select the screen to view information in. Three general areas of selection are available as "tabs" in PMTES; performance measures, goals, and mission statements. The specific record screens for each of these items are discussed in detail below.

Additional options are available by clicking buttons in the upper right hand corner of the page. These options are available while on any of the record filter screens.

### A. Performance Measure Descriptions and Amounts

Concept – The combo boxes in this screen allow users to select parameters to apply to the performance measures returned when advancing to the selected screen.

Performance Measure Descriptions and Amounts | Goal Descriptions | Mission Statements

**Performance Measure Descriptions and Amounts**

\* Tracking Biennium: 2003-05

Program: - Agency Level - Active Performance Measures: - All -

Active Goal: - All - OFM Measure: - All -

Goal: - All -

Performance Measure: - All -

Add/Update/Delete PM Descriptions Update/View PM Tracking Amounts \*

Copy Performance Measure Copy PM Tracking Amounts to New Biennium

Tracking Biennium – This combo box allows the user to select which biennium the user would like to view tracking data for. Biennia available include the current biennium plus previous biennium. The ensuing biennium is added to a statewide table three months prior to the start of that biennium.

This selection will only filter in the event of performance measure tracking screens. It will not have an effect on performance measure budget screens.

Program – This combo box allows the user to select performance measures for all programs or narrow the selection to a particular program. Performance measures are assigned a program based on the goal that they are identified with. See **Goal Descriptions** for more information on Goals.

Active Goal – Options include All, Yes, and No. This selection will enable users to narrow the selection of performance measures to those that have (or have not) been identified with a goal that is defined as active.

Goal – This selection enables users to narrow the selection of performance measures based on a particular goal. Options in this combo box list the goals for the agency in addition to an "All" selection. The list may be limited dependent on how "Active Goal" is selected in the previous option.

Performance Measures – This combo box enables to the user to select a specific performance measure to apply to the next selected screen. Options in this combo box are limited based on the previous selections, plus an "All" option.

Active Performance Measure - Options include All, Yes, and No. This selection will enable users to narrow the selection of performance measures to those that have (or have not) been identified as active.

OFM Measure - Options include All, Yes, and No. This selection will enable users to narrow the selection of performance measures to those that have (or have not) been identified as an OFM Measure.

Add/Update/Delete PM Descriptions – Takes users to the **Add/Update/Delete Performance Measure Descriptions** screen.

Copy Performance Measures- Takes users to the **Copy Performance Measure** screen.

Copy PM Tracking Amounts to New Biennium- Takes users to the **Copy PM Tracking Amounts to New Biennium** screen.

Update/View PM Tracking Amounts – Takes users to the **Update/View PM Tracking Amounts** screen.

## 1. Add/Update/Delete Performance Measure Descriptions

Concept – The Add/Update/Delete Performance Measure Descriptions screen is used to add, update, delete or view the details of a performance measure. In this screen you can scroll through each performance measures that matches the criteria specified on the **Record Filter** screen.

Program: -Agency Level- Goal: 100 - Implement and monitor state laws.123 sw Published: Yes

PM Code	PM Type	Preferred Level	Unit	OFM Measure	Active	Measurement Cycle	Budget Measure	Tracking Measure
140	Outcome		Number	Yes	Yes	Annual	Yes	Yes

**Performance Measure Short Description**  
Repeat audit findings

**Performance Measure Full Description**  
repeat audit findings as a percentage of total statewide audit findings.

**Footnote**

Go To Tracking Amounts  
Go To Data Source

Update Reset Edit Key Delete Add << < > >>

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Program – Displays the program or "Agency Level" that the currently displayed performance measures is related to. The performance measure relationship to a program is dependent on the goal. A performance measure relates to a goal, a goal relates to a program (or Agency Level).

Goal – The goal that a performance measure is related to. Once a performance measure has been established, its goal relationship cannot be changed. Field is gray to indicate update not allowed when not adding a new measure.

Published – This flag is set by the OFM Budget Division when a performance measure is published statewide. When the flag is set to yes, users will not be able to change any key fields (PM Code and Goal) or delete the performance measure.

PM Code – A three-digit code associated with a particular performance measure. The code is alphanumeric. A code is established by the user when initially adding a performance measure. The only rule that applies to the use of codes is that a code cannot be used more than once. Once a performance measure has been established, the code cannot be changed. Field is gray to indicate update not allowed when not adding a new measure.

PM Type – Performance measure type refers to the type of measure: outcome, output, or efficiency. See the Budget Instructions for information on the use for each type of performance measure.

Preferred Level – A field for the user to record the preferred level for the performance measure.

Unit - A combo box for users to establish what type of unit this performance measure is measured in. Options include dollar, number, percent, and ratio.

OFM Measure – A flag to indicate whether the performance measure is tracked by OFM. This flag will determine if the measure is submitted to OFM for budget or tracking as well as if it should print on various reports. This flag must be set to YES for a measure to be released to OFM for either budget or tracking and for the measure to print on any report that was developed for submittal to OFM.

Active – A flag to indicate whether the performance measure is active. A measure that is marked as active is considered active for current biennium tracking and/or ensuing biennium budget. Once a measure is no longer used by an agency, this flag should be set to No. This flag must be set to YES for a measure to be released to OFM for either budget or tracking and for the measure to print on reports.

Measurement Cycle – A combo box for users to indicate how often the performance measure is measured. Options include Annual, Biennial, Quarterly, or Semi Annual.

Budget Measure – This flag was used prior to the 2005-07 budget development to indicate the measure was active for the ensuing biennium budget. As of 2005-07 this flag no longer has meaning as performance measure budget assumptions are captured with Agency Activity Information.

Tracking Measures - A flag to indicate whether a measure is active for the current biennium performance measure tracking. This flag must be set to Yes for the measure to appear on any Performance Progress reports.

Performance Measure Short Description – A short description of the performance measure. There are 35 characters available in this field. This description will be on many reports as a space saver.

Performance Measure Full Description – A longer description field available to capture the full detail of a performance measures. This field has 255 characters available.

Footnote – A field to capture special notes regarding a performance measure. This note will be printed as a footnote to the performance measure on reports.

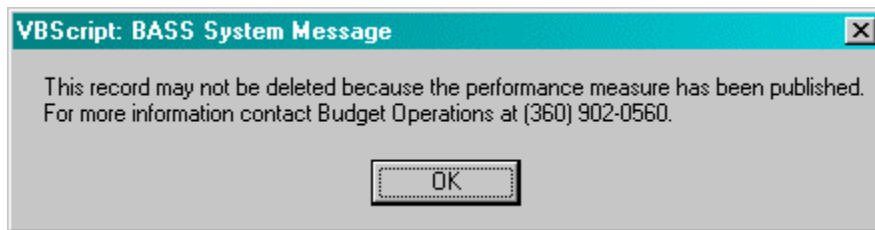
Go To Tracking Amounts – This button will take users to the **Update/View PM Tracking Amounts** screen for the performance measure. This button is only available when the performance measure Active flag is set to Yes.

Go To Data Source – Takes the user to a screen where they can add a description of the source of data for a performance measure.

Update – This button acts as a Save. Any new or updated information is saved when the Update button is clicked.

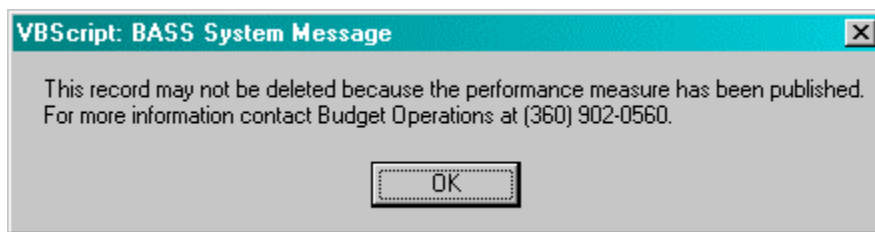
Reset – This button acts as an Undo. Any changes are discarded and the screen reverts back to last saved information when clicked.

Edit Key – This button may allow users to change the PM Code or Goal. This option is only available when the measure has not been published. If the measure had been previously published the user will receive the following message:



OK – Clicking OK will close this message and return the user to the **Add/Update/Delete Performance Measure Descriptions** screen.

Delete – This button may allow users to delete a performance measure. This option is only available when the measure has not been published by OFM. If the measure had been previously published, the user will receive the following message:



Add – This button allows the user to add a new performance measure. The screen will clear all fields including PM Code and Goal allowing full performance measure information to be added.

Arrows – The arrows allow a user to scroll through the performance measure that match the criteria of the Record Filter Screen.

- << Go to first record
- < Go to previous record
- > Go to next record
- >> Go to last record

## 2. Copy Performance Measure

Concept - The **Copy Performance Measure** screen allows users to copy a performance measure to a different program or agency level and/or to a new goal.

Source Program:	- Agency Level- ▾
Source Goal:	400 - Develop fiscally responsible budget and policy recommendations ▾
Source Performance Measure:	410 - Turnaround time for fiscal notes ▾
Target Program:	- Agency Level- ▾
Target Goal:	100 - Implement and monitor state laws ▾
<input type="button" value="Copy"/>	

Source Program – The user selects the Agency Level or a specific program that the performance measure to be copied resides in from the combo box. Only those programs (or agency level) that goals are currently defined to are available in the list.

Source Goal – The user selects the goal that the performance measure to be copied is related to from the combo box. Only active goals related to the Program selected are available in the list.

Source Performance Measure – The user selects the performance measure to be copied from the combo box. Only performance measures that match the criteria for program and goal selected above are available in the list.

Target Program - The user selects the Agency Level or a specific program that the performance measure is to be copied to from the combo box. Only those programs (or agency level) that goals are currently defined to are available in the list.

Target Goal - The user selects the goal that the performance measure is to be copied to from the combo box. Only active goals related to the Program selected are available in the list.

Copy – Clicking this button will copy a performance measure from a selected program and/or goal to a different program and/or goal as defined in the combo box options above.

### 3. Copy PM Tracking Amounts to New Biennium

Concept – This screen allows users to copy performance measure tracking estimates that are currently being tracked to a new tracking biennium. The result is a fresh display of **Update/View PM Tracking Amounts** screen for a new biennium with tracking estimates established. These estimates may need to be updated for the new biennium.



Copy Tracking Estimate Amounts From  To

Click the '+' next to a goal to display all related performance measure codes and descriptions. Each performance measure has a copy box. To select the performance measure tracking amounts to be copied, click on the copy box next to the measure. ONLY the performance measure tracking ESTIMATE amounts for each quarter will be copied.

Don't show this message ☐.

Goal Short Description

- + 100 - Implement and monitor state laws
- + 200 - Identify and communicate future trends
- + 300 - Improve central systems and business processes
- + 400 - Develop fiscally responsible budget and policy recommendations
  - 410 - Turnaround time for fiscal notes ☐ Copy
  - 420 - Agency budgets submitted with outcome measures ☐ Copy
- + 600 - Meeting Goals & Fulfilling Responsibilities
- + 700 - Promote confidence in state government
- + 800 - Provide improved systems

Total number of performance measures marked to copy: 0

Copy Tracking Amounts From – The user selects a biennium from the combo box that represents the biennium that tracking amounts are to be copied from. The biennia available start with the 1997-99 biennium and include each biennium since. New biennia are added by OFM as the biennium is closing.

To - The user selects a biennium from the combo box that represents the biennium that tracking amounts are to be copied to. The biennia available start with the 1999-01 biennium and include each biennium since. New biennia are added by OFM prior to the start of a new biennium.

Don't show this message – Checking the box hides the instructional message provided on this screen.

Goal Selection – A list of active goals with each goal preceded by a + sign. A user can click on the + sign to expand the list to display the active performance measures associated with the respective goal. Performance measures are displayed in blue. In addition, a copy checkbox appears to the right of the measure.

Copy – Checking the box indicates that the performance measure should be copied to the new biennium as indicated in the biennia selection above.

Total number of performance measures marked to copy – Displays a total number of performance measures marked to be copied.

Submit – Clicking this button activates the performance measure copy for the measures marked.

#### 4. Update/View PM Tracking Amounts

Concept – To record performance measure estimates and actual amounts as the numbers become available. Tracking is handled on a quarterly basis. This screen is used to meet quarterly performance measure tracking requirements as defined by OFM. The results for measures that are marked as Tracking, Active, and OFM Measures will be submitted to OFM electronically through the Data Release module of BASS.

File ▾ Views ▾ Quarter ▾ Help ▾								
	Program	Goal	PM	PM Short Description	Q1 Estimate	Q1 Actual	Q1 Last Measured	Q1 Comments
1		100	110	Repeat audit fundings				Update Comment
2		200	210	State population forecast variance				Add Comment
3		300	310	% of AFRS transactions resulting in en				Add Comment
4		400	410	Turnaround time for fiscal notes				Add Comment
5		400	420	Agency budgets submitted with outco				Add Comment
6		600	602	Timeliness of vendor payments				Add Comment
7		700	702	Integrity of OFM information				Add Comment
8		800	801	Reducing agencies cost for processin				Add Comment

Goal: 100 Active Goal: YES PM: 110 Active PM: YES OFM Measure: YES Outcome/ Percent/ Annual Tracking Amounts

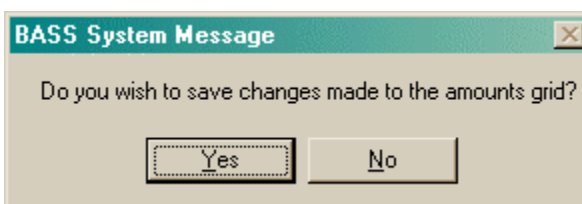
## Menu Bar

### File

**Save Changes** – Saves the changes input by users. Unsaved data is indicated by blue text. Once the data is saved the text will turn black to indicate it is saved.

**Cancel Changes** – Undoes all unsaved changes as indicated by blue text. The screen will return to the data as it appeared at the time of the last save or when the screen was first entered.

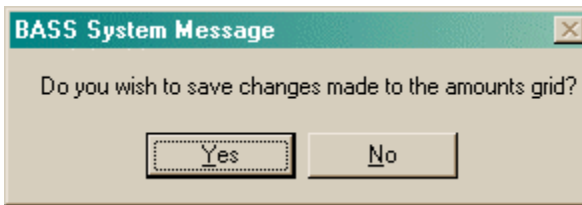
**Exit to Filter** – Returns the user to the **Record Filter** screen. If there has been a change to the data on the screen that has not been saved the user will be prompted to save data with the following dialog box:



**Yes** – Saves the changes on the screen and returns the user to the **Record Filter** screen.

**No** – Takes the user to the **Record Filter** screen without saving changes.

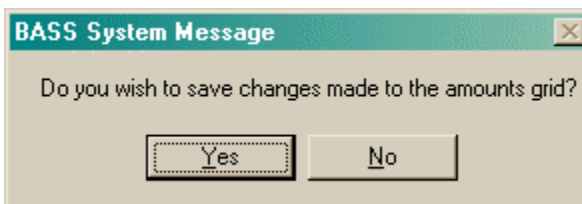
**Exit to Previous Screen** – Returns the user to the screen where the user had entered from. If there has been a change to the data on the screen that has not been saved the user will be prompted to save data with the following dialog box:



Yes – Saves the changes on the screen and returns the user to the previous screen.

No – Takes the user to the previous screen without saving changes.

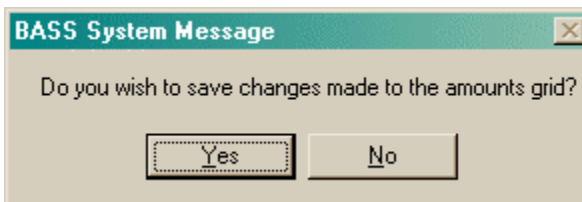
Exit to Reports – Takes the user to the **Reports** screen. If there has been a change to the data on the screen that has not been saved the user will be prompted to save data with the following dialog box:



Yes – Saves the changes on the screen and returns the user to the **Reports** screen.

No – Takes the user to the **Reports** screen without saving changes.

Exit and Logoff – Logs the user off the BASS system. If there has been a change to the data on the screen that has not been saved the user will be prompted to save data with the following dialog box:



Yes – Saves the changes on the screen and logs the user off the BASS system.

No – Logs the user off the BASS system without saving changes.

View – Various view options are available to allow the user to customize the screen to enhance their data entry processes.

Hide Estimates – Hides all columns in the display that represent performance measure estimates.

Hide Actuals – Hides all columns in the display that represent actual performance measurements.

Hide Comments – Hides the comments columns in the display.

Hide Last Measured – Hides all columns in the display that represent the date last measured.

Show All Columns – Redisplays all hidden columns.

Freeze Columns 1-4 – Freezes the first four columns of the display allowing the user to see the basic performance measure information as they scroll through the columns.

Quarter – Eight quarters exist for each biennium for tracking. This menu option includes eight display options, one for each quarter as determined by "Display Quarter X" with X representing a quarter number. Picking a display quarter option hides all other quarter columns allowing the user to enter information for the appropriate quarter without excess columns displayed. All columns associated with the selected quarter will be displayed. Show All Columns is the only view option available when a specific quarter has been selected through the Quarter menu option.

Help – Three help options are available for users.

Quick Reference Guide – Opens a new browser window with a Word document describing the Tracking Amounts screen.

BASS Help Desk – Opens a new browser window with the BASS Help Desk web page.

Who to Contact – Opens a new browser window with the "Who To Contact" page of the BASS help files.

Grid – Each row is a separate performance measure, each column is an element (field) of the performance measure records.

Program – The program a performance measure is associated with is displayed. The performance measure is assumed to be agency level if blank. This column is in blue indicating it cannot be updated in the **Update/View PM Tracking Amounts** screen. Performance measure identification information can only be changed in the **Add/Update/Delete Performance Measure Descriptions** screen.

Goal - The goal a performance measure is associated with is displayed. This column is in blue indicating it cannot be updated in the **Update/View PM Tracking Amounts** screen. Performance measure identification information can only be changed in the **Add/Update/Delete Performance Measure Descriptions** screen.

PM – The performance measure code is displayed. This column is in blue indicating it cannot be updated in the **Update/View PM Tracking Amounts** screen. Performance measure identification information can only be changed in the **Add/Update/Delete Performance Measure Descriptions** screen.

PM Short Description – The performance measure short description is displayed. The program a performance measure is associated with is displayed. The performance measure is assumed to be agency level if blank. This column is in blue indicating it cannot be updated in the **Update/View PM Tracking Amounts** screen. Performance measure identification information can only be changed in the **Add/Update/Delete Performance Measure Descriptions** screen.

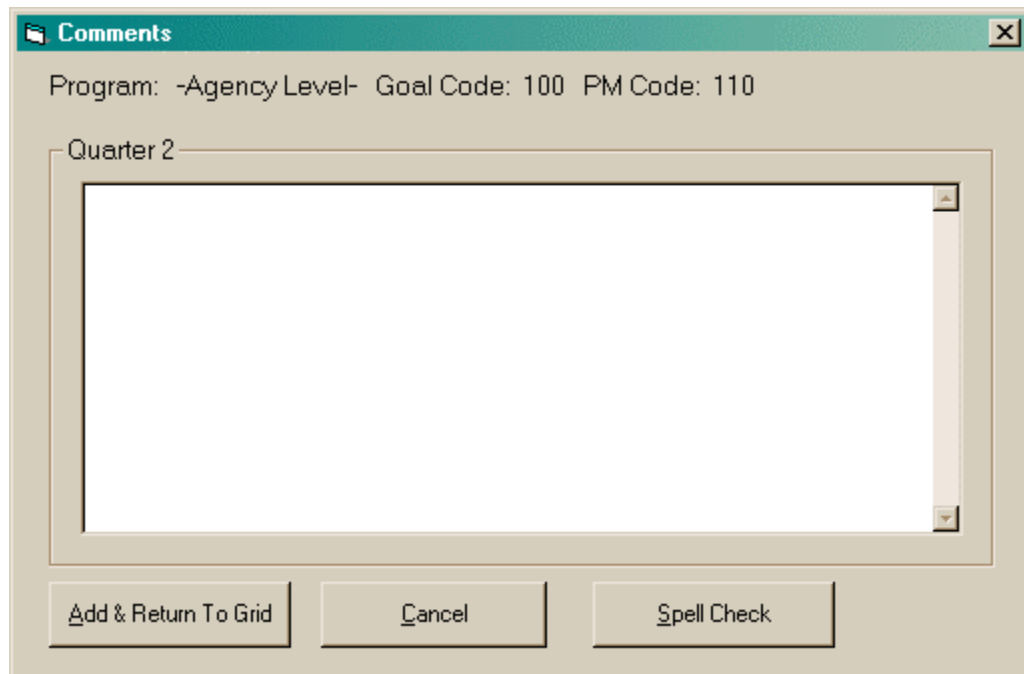
*Each of the 8-quarters for a biennium has a set of four columns.*

Q# Estimate – The column users enter the quarter estimate for the respective performance measure. This data will be electronically sent to OFM for measures that are flagged as Active, Tracking, and OFM Measure through the Data Release module of BASS.

Q# Actual - The column users enter the actual quarter measurement for the respective performance measure. This data will be electronically sent to OFM for measures that are flagged as Active, Tracking, and OFM Measure through the Data Release module of BASS.

Q# Last Measured – This column is used to record the date the performance measure was last measured. Users will not be able to save a date when it is prior to the date of another earlier entered quarter.

Q# Comments – The Add Comment button in each record will display the following dialog box for users to enter comments regarding the particular measure and quarter.

A screenshot of a Windows-style dialog box titled "Comments". The title bar is green with a close button (X) on the right. Below the title bar, the text "Program: -Agency Level- Goal Code: 100 PM Code: 110" is displayed. Underneath, there is a label "Quarter 2" followed by a large, empty white text area with a vertical scrollbar on the right. At the bottom of the dialog box, there are three buttons: "Add & Return To Grid", "Cancel", and "Spell Check".

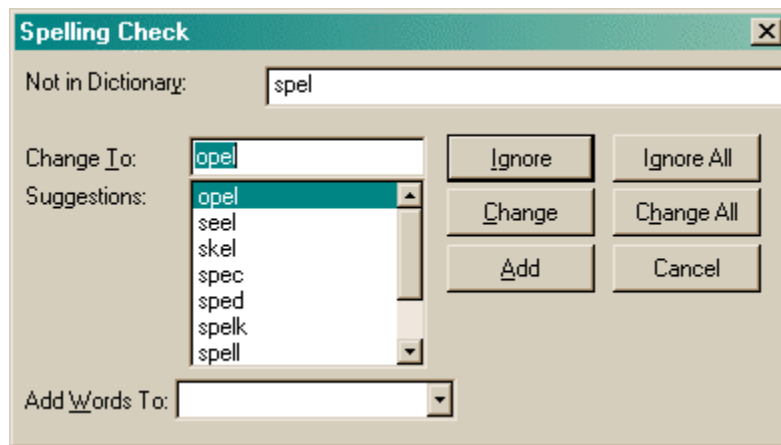
Identification – The line at the top of the dialog box indicates the performance measure identification information.

Quarter (text box) – Users may enter a comment regarding the selected performance measure tracking quarter in this text field. There is not a limit to the number of characters available. The comment will transfer to the **Performance Progress** reports and be transferred to OFM upon data submittal for measures that are marked Tracking, Active, and OFM Measure.

Add & Return to Grid – Clicking the button will save the entered text to the database and return the user to the **Update/View PM Tracking Amounts** screen.

Cancel – Clicking the button will return the user to the **Update/View PM Tracking Amounts** screen without saving text.

Spell Check – Clicking the button invokes the spell check application in a separate dialog box for any text in the white text box. The spell check application does not allow for the user to add new words.



Not in Dictionary – Spell check did not recognize the indicated word

Ignore – Click to ignore selected occurrence of the unrecognized word

Ignore All – Click to ignore all occurrences of the unrecognized word

Suggestions – Click on one of the offered suggestions to allow spell check to update the unrecognized word.

Change To – User selection to update unrecognized word.

Suggestions – User may select a different suggestion at any time prior to changing.

Change – Clicking invokes the selected Change for the first occurrence

Change All – Clicking invokes the selected Change for all occurrences of the unrecognized word.

Cancel – Cancels the spell check function.

Add – This button is to allow users to add a word to a personal dictionary.

Spell Check confirmation box – This box will appear when the spell check application is closing. Click OK to return to **Update/View PM Tracking Amounts**.

Performance Measure Description Information – A line at the bottom of the screen gives further information regarding a performance measure including: goal, active goal, PM code, Active, OFM measure, type, unit, and measurement cycle. (See **Add/Update/Delete Performance Measure Descriptions**, page 5 for more information)

## **B. Goal Descriptions**

Concept – Each performance measure must be related to an agency goal. The Goal tab is where agencies record their agency's goals. Goals must exist before performance measures can be added. The goal filter screen allows users to specify information to filter the goal selection.

Program – This combo box allows the user to select a specific program, agency level, or all goals as filter criteria for the **Add/Update/Delete Goal Descriptions** screen. Programs available are those established in the statewide program titles file.

Active – This combo box allows the user to select active (yes), inactive (no), or all goals as a filter criterion for the **Add/Update/Delete Goal Descriptions** screen.

Goal - This combo box allows the user to select a specific goal or all goals as filter criteria for the **Add/Update/Delete Goal Descriptions** screen.

Add/Update/Delete Goal Descriptions – Clicking this button will load the **Add/Update/Delete Goal Descriptions** screen based on the filter criteria selected.

## 1. Add/Update/Delete Goal Descriptions

Concept – Users can enter and edit goals using this screen. All the information related to a goal is displayed on this screen. Published goals are limited in editing information as described below.

Program – Display the specific program a goal is related to or agency level. The program is defined when the goal is initially entered and cannot be edited once saved.

Active – This combo box allows the user to define whether a goal is active (yes) or not (no). The default when adding a new goal is Yes. Users may choose to inactivate a goal by marking this option No as the agencies mission and goals are reviewed and revised.



Published – *Not available when adding a new goal.* This field indicates whether OFM has published the goal. This flag is set by OFM staff at the time a performance measure is published.

Goal Code - A three-digit code associated with a particular goal. The code is alphanumeric. A code is established by the user when initially added. The only rule that applies to the use of codes is that a code cannot be used more than once. Once a goal has been established, the code cannot be changed. Field is gray to indicate update not allowed when not adding a new goal.

Goal Short Description– A short description of the goal. There are 35 characters available in this field. This description will be on many reports as a space saver.

Goal Full Description – A longer description field available to capture the full detail of a goal. There are 255 characters available in this field.

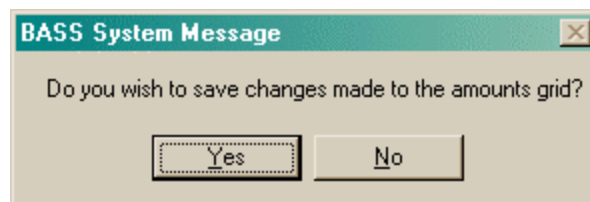
Go to Tracking Amounts – This button will take the user to the **Update/View PM Tracking Amounts** screen. This button is grayed out indicating the option not available if there are no performance measures associated with this goal.

Go to Performance Measure Descriptions – This button will take the user to the **Add/Update/Delete Performance Measure Descriptions** screen.

Update – This button acts as a Save. Any new or updated information is saved when the Update button is clicked.

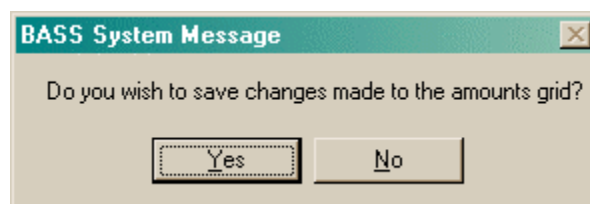
Reset – This button acts as an Undo. Any changes are discarded and the screen reverts back to last saved information when clicked.

Edit Key – This button may allow the user to change the Goal code. This option is only available when the measure has not been published. If the measure had been previously published the user will receive the following message:



OK – Clicking OK will close this message and return the user to the **Add/Update/Delete Goal Descriptions** screen.

Delete – This button may allow users to delete a goal. This option is only available when the measure has not been published by OFM. If the goal had been previously published, the user will receive the following message:



Add – This button allows the user to add a goal measure. The screen will clear all fields allowing goal information to be added.

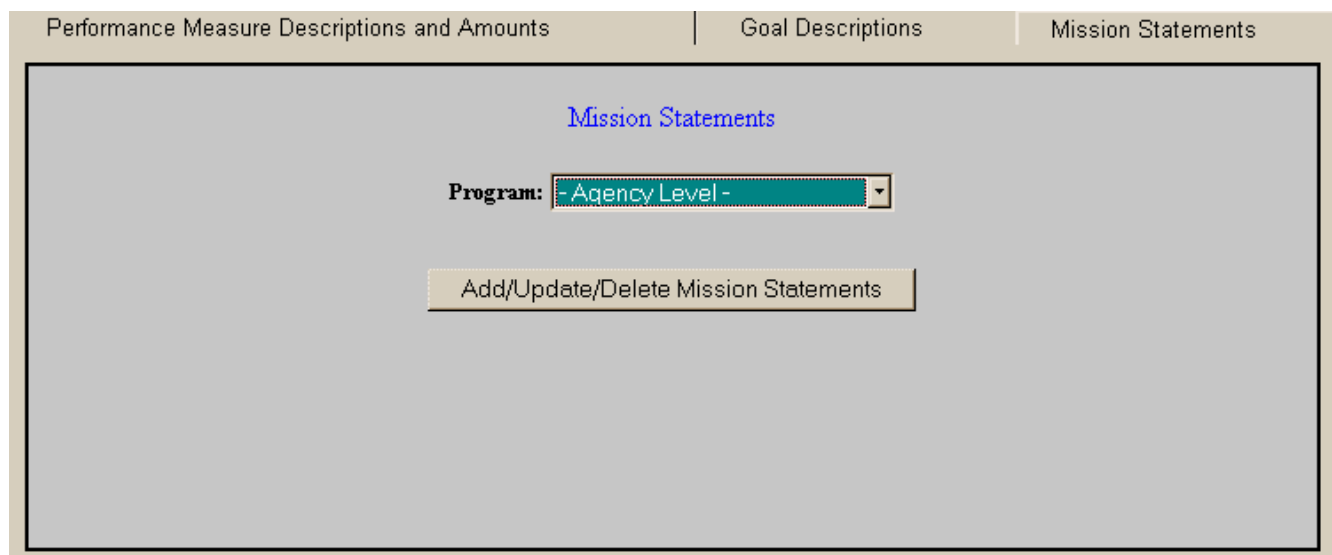


Arrows – The arrows allow a user to scroll through the goals that match the criteria of the Record Filter Screen.

- << Go to first record
- < Go to previous record
- > Go to next record
- >> Go to last record

### C. **Mission Statements**

Concept – Agencies can electronically submit their mission statements to OFM by use of this tab set. Agencies may have one agency level mission and/or many program level mission statements.



Program – Users can select a combo box option to filter a specific program, agency level, or all mission statements to view the agency's goal(s).

Add/Update/Delete Mission Statements – This button will take the user to the **Add/Update/Delete Mission Statements** screen.

#### 1. **Add/Update/Delete Mission Statements**

Concept - Allows the agency to enter a Mission statement for electronic submittal to OFM. Mission statements are uniquely identified by the combination of the program and adopted date.

**Program**  
 [-Agency Level-] ?

**Date Adopted**  
 01/01/2000 ? mm/dd/yyyy

**Mission Statement**  
 Added January 1/1/2001

Update Reset Edit Key Delete Add << < > >>

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Program – Users select an option in the combo box to display the specific program a mission statement is related to or agency level. The program is defined when the mission statement is initially entered and cannot be edited once saved. This item is grayed out indicating edits not available. Use Edit Key function to change the program.

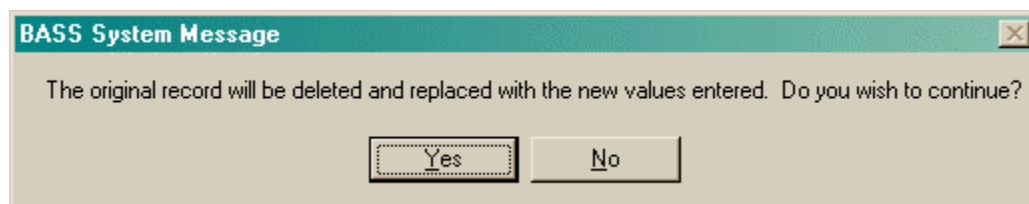
Date Adopted – The date the mission statement is to be adopted or enacted. A more recent date is assumed to supersede a previous entry as a new mission statement. This item is grayed out indicating edits not available. Use Edit Key function to change the date adopted.

Mission Statement – Users enter their mission statement in this text box. There are no formatting options available. The mission statement is not limited in the number of characters available.

Update – This button acts as a Save. Any new or updated information is saved when the Update button is clicked.

Reset – This button acts as an Undo. Any changes are discarded and the screen reverts back to last saved information when clicked.

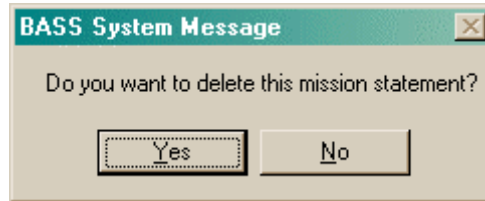
Edit Key – This button may allow the user to change the mission statement program or adopted date by deleting the original entry and adding a new entry. The following dialog box will be displayed when the Edit Key button is selected:



Yes – Duplicates the data into an unsaved mission being added and deletes the original record. Result is it appears the key field was changed in one record.

No – Returns the user to the **Add/Update/Delete Mission Statements** screen without proceeding.

Delete – This button may allow users to delete a mission statement. Users will receive the following message to confirm deletion:



Yes – Deletes the mission statement and returns the user to the **Add/Update/Delete Mission Statements** screen

No - Returns the user to the **Add/Update/Delete Mission Statements** screen without proceeding.

Add – This button allows the user to add a new mission statement. The screen will clear all fields allowing mission statement information to be added.

Arrows – The arrows allow a user to scroll through the goals that match the criteria of the Record Filter Screen.

- << Go to first record
- < Go to previous record
- > Go to next record
- >> Go to last record

## **II. Reports**

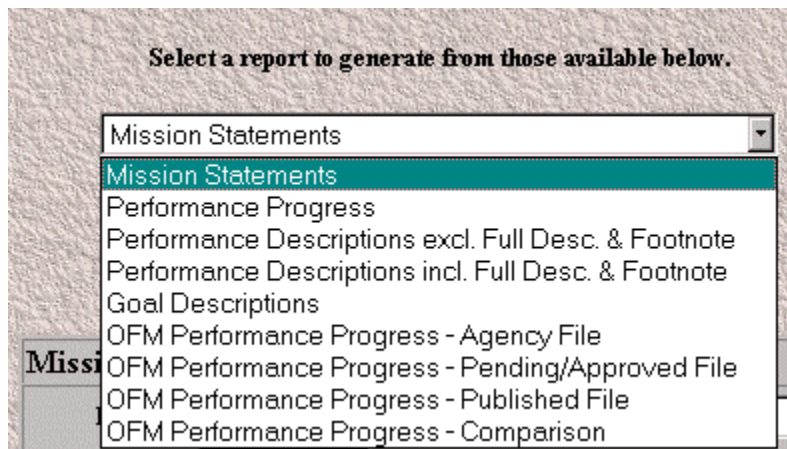
Many reports are available in PMTES including official OFM submittal reports and reports for internal agency information. All reports are viewed on screen using Crystal 8.0 report reader and may be printed or downloaded to Excel, Word, or Rich-Text format.

### **A. Reports**

A drop down box on the selection screen allows the user to select which report they wish to run. The screen reformats depending on the report option selected. Each variation is described below.

Samples of each report are included in the Appendix.

Select a report to generate from those available below – A list of all available reports fills the combo box for a user to select the desired report.



Crystal 8.0 – A product developed by Seagate for generating on-line reports.

## 1. Mission Statements

Concept – A listing of the agency's mission statement(s). Users may select all missions or a specific mission for the report.

Program – A list of the agency's programs from the statewide titles file, plus all and agency level, are available in the combo box for users to select an option to include in the report.

Date Adopted – Users may select by the date adopted for each mission statement or All mission statements meeting the program criteria selected.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency Number and Title
- Program selected
- Date Adopted selected
- **Program group header**
- Date Adopted
- Mission Statement

## 2. Performance Progress

Concept – A report that allows agency users view performance progress as compared to estimates.

Performance Progress	
Biennium:	1999-01
Program:	- All -
Active PM:	Yes
OFM Measure:	Yes
Tracking PM:	Yes
<input type="button" value="Generate Report"/>	

Biennium – The combo box contains a list of all biennia that performance measure tracking is available for. The user selects the desired biennium for the Performance Progress report.

Program – A list of the agency's programs from the statewide titles file, plus all and agency level, are available in the combo box for users to select an option to include in the report.

Active PM – The users selects Yes or No from the combo box to select whether to report on active or inactive performance measures.

OFM Measure – The users selects Yes or No from the combo box to select whether to report on OFM measures.

Tracking PM – This option is assumed and selected to be Yes. Users are not able to change field.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency code and title
- Program option selected
- Biennium
- Active PM option selected
- OFM Measure option selected
- **Program group header**
- **Goal code and full description as group header**
- Performance Measure code
- Performance Measure full description
- Cycle
- Type
- Unit
- Footnote
- Estimate by quarter
- Actual by quarter
- Date last measured
- Quarter comments

### 3. Performance Descriptions excl. Full Desc. & Footnote

Concept – Lists performance measures details excluding the full description and footnote fields.

**Performance Descriptions excl. Full Desc. & Footnote**

Program: - Agency Level -

Active Goal: Yes

Goal: - All -

Active PM: Yes

OFM Measure: - All -

Generate Report

Program – A list of the agency's programs from the statewide titles file, plus all and agency level, are available in the combo box for users to select an option to include in the report.

Active Goal – The users selects Yes, No, or All from the combo box to select whether to report on performance measures tied to active, inactive, or all goals.

Goal – Users select a specific goal or all goals using the combo box

Active PM – The users selects Yes, No, or All from the combo box to select whether to report on active, inactive, or All performance measures.

OFM Measure –The users selects Yes, No, or All from the combo box to select whether to report on OFM, non-OFM, or All performance measures.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency code and title
- Program option selected
- Active Goal option selected
- Goal Code option selected
- Active Performance Measure option selected
- OFM Measure option selected
- **Program group header**
- **Goal code and full description as group header**
- Performance Measure code
- Performance Measure type
- Long Term Preferred Level
- Unit
- OFM Measure
- Active
- Budget PM
- Track PM
- Tracking Published
- Measurement Cycle
- Short Description

#### 4. Performance Descriptions Incl. Full Desc. & Footnote

Concept – Lists performance measures details including the full description and footnote fields.

Select a report to generate from those available below.

Performance Descriptions incl. Full Desc. & Footnote

**Performance Descriptions incl. Full Desc. & Footnote**

Program: - Agency Level -

Active Goal: Yes

Goal: - All -

Active PM: - All -

OFM Measure: - All -

Generate Report

Program – A list of the agency's programs from the statewide titles file, plus all and agency level, are available in the combo box for users to select an option to include in the report.

Active Goal – The users selects Yes, No, or All from the combo box to select whether to report on performance measures tied to active, inactive, or all goals.

Goal – Users select a specific goal or all goals using the combo box

Active PM – The users selects Yes, No, or All from the combo box to select whether to report on active, inactive, or All performance measures.

OFM Measure –The users selects Yes, No, or All from the combo box to select whether to report on OFM, non-OFM, or All performance measures.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency code and title
- Program option selected
- Active Goal option selected
- Goal Code option selected
- Active Performance Measure option selected
- OFM Measure option selected
- **Program group header**
- **Goal code and full description as group header**
- Performance Measure code
- Performance Measure type
- Long Term Preferred Level
- Unit
- OFM Measure
- Active
- Budget PM
- Track PM

- Tracking Published
- Measurement Cycle
- Short Description
- Full Description
- Footnote
- Data Source

## 5. Goal Descriptions

Concept – A list describing the agency's goals.

The screenshot shows a window titled "Goal Descriptions". Inside, there are two dropdown menus. The first is labeled "Program:" and has "- Agency Level -" selected. The second is labeled "Active Goal:" and has "Yes" selected. Below these menus is a button labeled "Generate Report".

Program – A list of the agency's programs from the statewide titles file, plus all and agency level, are available in the combo box for users to select an option to include in the report.

Active Goal – The users selects Yes, No, or All from the combo box to select whether to report on performance measures tied to active, inactive, or all goals.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency code and title
- Program option selected
- Active Goal option selected
- Goal Code
- Short Description
- Full Description
- Active
- Number of associated performance measures

## 6. OFM Performance Progress – Agency File

Concept – Tracking performance progress for all Active, OFM, Tracking measures. Tracking is based on data entered in PMTES.



OFM Performance Progress - Agency File	
Biennium:	1999-01
Program:	Agency Level
Active PM:	Yes
OFM Measure:	Yes
Tracking PM:	Yes
Generate Report	

Biennium – The combo box contains a list of all biennia that performance measure tracking is available for. The user selects the desired biennium for the Performance Progress report.

Program – This option is assumed to be agency level indicating performance measures that are tied to agency level goals in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot be changed.

Active PM – This option is assumed to be Yes indicating performance measures that are marked as active in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

OFM Measure – This option is assumed to be Yes indicating performance measures that are marked as OFM measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Tracking PM - This option is assumed to be Yes indicating performance measures that are marked as Tracking measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency Code and Title
- Mission Statement
- Goal Code and Title
- Performance Measure Full Description
- Footnote
- Measure type
- Each quarter estimate
- Each quarter actual
- Date measured
- Quarter comment

## 7. OFM Performance Progress – Pending/Approved File

Concept – Tracking performance progress for all Active, OFM, Tracking measures. Tracking is based on data submitted to OFM through data release.

OFM Performance Progress - Pending/Approved File	
Biennium:	1999-01 ▾
Program:	Agency Level
Active PM:	Yes
OFM Measure:	Yes
Tracking PM:	Yes
<input type="button" value="Generate Report"/>	

Biennium – The combo box contains a list of all biennia that performance measure tracking is available for. The user selects the desired biennium for the Performance Progress report.

Program – This option is assumed to be agency level indicating performance measures that are tied to agency level goals in the **Add/Update/Delete Performance Measure Descriptions** screen will be include in this report. This option cannot be changed.

Active PM – This option is assumed to be Yes indicating performance measures that are marked as active in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

OFM Measure – This option is assumed to be Yes indicating performance measures that are marked as OFM measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Tracking PM - This option is assumed to be Yes indicating performance measures that are marked as Tracking measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency Code and Title
- Mission Statement
- Goal Code and Title
- Performance Measure Full Description
- Footnote
- Measure type
- Each quarter estimate
- Each quarter actual
- Date measured
- Quarter comment

## 8. OFM Performance Progress – Published File

Concept – Tracking performance progress for all Active, OFM, Tracking measures. Tracking is based on published by OFM.

OFM Performance Progress - Published File	
Biennium:	1999-01
Program:	Agency Level
Active PM:	Yes
OFM Measure:	Yes
Tracking PM:	Yes
Generate Report	

Biennium – The combo box contains a list of all biennia that performance measure tracking is available for. The user selects the desired biennium for the Performance Progress report.

Program – This option is assumed to be agency level indicating performance measures that are tied to agency level goals in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot be changed.

Active PM – This option is assumed to be Yes indicating performance measures that are marked as active in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

OFM Measure – This option is assumed to be Yes indicating performance measures that are marked as OFM measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Tracking PM - This option is assumed to be Yes indicating performance measures that are marked as Tracking measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

Generate Report – Generate the selected report in the Crystal Report Viewer.

Report Includes:

- Agency Code and Title
- Mission Statement
- Goal Code and Title
- Performance Measure Full Description
- Footnote
- Measure type
- Each quarter estimate
- Each quarter actual
- Date measured
- Quarter comment

## 9. OFM Performance Progress – Comparison

Concept – Compares the performance progress detail from selected areas: agency file, pending/approved, and published (see previous 3 reports).

Performance Progress Comparison Report	
Biennium:	1999-01
Program:	Agency Level
Active PM:	Yes
OFM Measure:	Yes
Tracking PM:	Yes
Compare File One:	Agency File
Compare File Two:	Published File
Generate Report	

**Biennium** – The combo box contains a list of all biennia that performance measure tracking is available for. The user selects the desired biennium for the Performance Progress report.

**Program** – This option is assumed to be agency level indicating performance measures that are tied to agency level goals in the **Add/Update/Delete Performance Measure Descriptions** screen will be include in this report. This option cannot be changed.

**Active PM** – This option is assumed to be Yes indicating performance measures that are marked as active in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

**OFM Measure** – This option is assumed to be Yes indicating performance measures that are marked as OFM measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

**Tracking PM** - This option is assumed to be Yes indicating performance measures that are marked as Tracking measures in the **Add/Update/Delete Performance Measure Descriptions** screen will be included in this report. This option cannot change.

**Compare File One** – The combo box contains options of Agency File (PMTES data), Pending/Approved File (Submitted to OFM), and Published File (published data) for the user to select one for comparison.

**Compare File Two** – The combo box contains options of Agency File (PMTES data), Pending/Approved File (Submitted to OFM), and Published File (published data) for the user to select one for comparison.

**Generate Report** – Generate the selected report in the Crystal Report Viewer.

**Report Includes:**

- Agency Code and Title
- Program option selected
- Active option selected
- OFM measure option selected
- Biennium option selected
- Remaining items displayed for each compare file**
- Mission Statement
- Goal Code and Title
- Performance Measure code
- Performance Measure Full Description
- Footnote

- Each quarter estimate
- Each quarter actual

